

**Kansas Interlibrary Loan Roundtable (KILR), Kansas Library Association (KLA)  
Statewide Fall InterLibrary Loan meeting  
20 October 2010**

These minutes include notes from the day-long Fall ILL meeting held at Salina Public Library and five remote sites via video link. The remote sites were Coffee County Burlington, NWKLS Norton Public, Dodge City Public, NEKLS Lawrence Public, and Great Bend Public. The semi-annual KILR business meeting was the last session of the day.

- I. **Auto-Graphics Update.** *Mary Jackson, Resource Sharing Project Manager for Auto-Graphics,* gave a preview of coming attractions in scheduled upgrades to AGent/Illuminar, as well as addressing concerns that have been noted by Kansas ILL practitioners in the past half year or so. Her slide presentation is available on the KILR web site at <http://kslibassoc.org/SectionsRoundTables/KILR/news.htm>.
- Auto-Graphics is aware that slow load time is a significant issue for Kansas libraries; they have made a number of changes since last spring to speed up Illuminar load time, and they continue to monitor system performance. However, a show of hands at this meeting indicated that most libraries are using the AGent classic interface rather than Illuminar, based on both staff and patron preferences. One library reported that most of their patrons stopped initiating requests when Illuminar was released because their home computers and internet connections are too slow to handle it effectively. Staff also report that patrons are confused by the busy/cluttered Illuminar results display; it's hard to instruct the public on initiating requests because search results aren't de-duplicated, and patrons don't know which record to pick. This, of course, is a feature of our "hybrid" union catalog setup that queries many member libraries in real-time as well as maintaining a periodically-updated Main Catalog.
  - Mary Jackson reminded the group that Illuminar is not just a web page but an application, hence the load-time wait on startup. Version 3.7 is due out in a month or so and will allow users to turn off resource-hogging special effects like the sliding graphics.
  - Version 3.8 of Illuminar (no release date set) is in production at A-G now and will include a staff ILL form. A-G has redirected other development projects to focus on this release, based on feedback from their September virtual user group meetings.
  - See slide presentation for information on how AGent builds lender lists for ILL requests. A-G recently refined the record validation process to make author matching more precise; in fact, maybe *too* precise: if other fields match but potential lender's Author field doesn't include dates, the lender will be skipped. This feature will be reversed in a future AGent release. The Title field will continue to look for an exact match, which demands systematic cataloging from member libraries without local additions to the Title field. **So when you create a request, don't edit the Title field!**
  - MJ asked the group if any are allowing unmediated patron requests; no one admitted to it. She encouraged all libraries to let at least their "best" patrons do their own searching and initiate mediated requests. When choosing a record to request from, just use any record that is in the format/edition needed; no need to look for the one with the most library holdings because the system will find lenders on its own.
  - New State Library project: Floating Collection. The State Library of Kansas is buying a collection of playaway audiobooks (MP3-type players that contain one title and can be physically checked out) that will function as a floating collection. This means the record will be added to the KS Main Catalog with the current borrowing library showing as the owner. When the next borrower marks it Received, the KLC will show that library as the current owner until it is next requested.

- Questions from the floor
  - *Ordering articles – system doesn't seem to pull lenders from other journal records.* If an ISSN is present in the record, it should do this.
  - *Would like suggestions on how to educate patrons in interpreting search results when there are no KS Main Catalog results.* In Classic AGent, it might help to collapse the folders under the search box to reduce patron confusion; they don't need to know exactly which catalogs are being searched.
  - *Would like the ability to deflect requests based on format: as a lender, regularly get requests for e-books and audio files that are not lendable.* This is #2 on A-G's enhancement/development list based on user feedback; the system needs a more accurate way to build lender lists so e-book owners never see these bogus requests. Rhonda Machlan noted that the State Library does not support allowing individual libraries to deflect requests based on format because they want to encourage the broadest possible scope of lending.
  - *Can a library allow some patrons to do mediated requesting and others non-mediated?* This depends on the patron authentication system at the local library.
  - *Would like more status change options; e.g., from "Retry" you can't update to "Received" if the lender updated in error.* A workaround from Rhonda: strip out the other lenders in the lender list and resubmit to the actual lender so they can update to Shipped.

**II. KICNET Update and AGent questions.** *Rhonda Machlan, Resource Sharing Specialist, State Library of KS.*

- Avoid duplicate shipments! Lenders, print off the request that gets sent with the item *after* you update it to Shipped. Borrowers, stay alert when updating to Received: if you receive duplicate items, keep the one from the library that actually updated to Shipped. *Suggestion:* edit your request forms to move the Due Date field closer to the top of the page; then just print off the first page after updating to Shipped and highlight that date for the borrowing library.
- Due dates. If there is a discrepancy, the due date written/stamped on the paperwork is the real one; otherwise, borrowers should use the system-supplied due date.
- Shipping Labels feature in AGent is not turned on for Kansas because we use two shipping methods: Courier and U.S. mail.
- Courtesy notices (overdues sent out before the due date) are sometimes generated automatically by the lending library's ILS; this can be confusing for the borrower. If in doubt, call or email the lending library.
- Lending Policy feature in AGent can allow the system to route requests based on the owning library's policy information; however, KS does not use this feature because we want to encourage lending whatever is on shelf and available within the state.
- Do not edit the Title field when creating requests! This is a change from previous practice. Changing the title field now interferes with the system availability checking. Please put special format notes in the Borrowing Notes field, and Lenders, remember to check this field! *If you are careful,* you can add a Retry Date to the title field for your own information *if* you delete it before resending the request. A safer method is to put the Retry info in the Patron Name field, which is visible in the status brief list format.
- Multiple Copy request feature can also be used for single copy requests; this allows you to preview and edit the lender list.
- For ILLiad users, should Conditionals be done manually through AGent? No, both ILLiad and AGent support ISO, so all updating should be done through ILLiad if you have it. You can go into AGent manually to check whether it took, though.

- State Courier Policy Committee will be looking at the formula for preferred lender lists again. Previously the courier preferred lenders had been ordered by collection size; more recently they used the same formula as non-courier libraries, which is a ratio of borrowing to lending volume. *From the floor:* Have a perception that since the courier started, lender response time has slowed. There was general disagreement with this idea; response seems faster now with the courier running.
- Book discussion groups commonly request longer loan periods, but lenders don't always see or honor this. Rather than just keep the book longer, borrower should contact the lender and ask for a renewal. Often it was a simple oversight when checking out the book.
- Book discussion group sets are available to any discussion group that uses the local library as a liaison or meeting place. See list of titles at <http://skyways.lib.ks.us/KSL/libtech/bkdiscuss.html>.
- Renewal requests. If there is no response from the lender, assume the item is renewed for the original loan term. Mary Jackson noted that in the AGen Participant Record, lenders may choose whether the renewal period is added to the original due date or to the date of renewal request (last item in the top section, "Lender Information").
- Enhancement request: allow email messaging within AGen to notify other libraries of request status problems. *This will not be considered because it could encourage bypassing the regular use of system status updates. However, Mary Jackson will make the following enhancement request on our behalf: Have system flag requests if they have not been updated within an appropriate amount of time, e.g., if not Completed after being in Returned status for a certain number of days/weeks.*
- Borrowers should return lender's paperwork with the item.
- Borrowers appreciate a comment in the Lending Notes field when an item is not supplied. E.g., for Retry, an expected available date; for Policy Problem, more details. Patrons often want to know why they couldn't get an item.

**III. Courier Do's and Don'ts.** *Carolyn Little, Courier Services Coordinator.* See the KS Library Express courier web site for a link to Carolyn's presentation, at <http://kslibexpress.mykansaslibrary.org/about/users-guide/tips-and-tricks/>. Click on "this link."

- Current courier traffic is around 58,000 items per month.
- Henry Industries serves businesses other than libraries, so it's best to use our distinctive red (or blue) bags. These also provide protection from moisture, so cardboard boxes, e.g., are best shipped inside a bag if possible.
- Try not to use large bags unless size of shipment warrants it: excess fabric can get caught in the sorting machinery; also, KLE has purchased fewer large than small bags so there aren't as many to go around.
- Rubber bands around books (inside bags) help protect them from damage and keep paperwork inside. However, there's no formal mandate to use rubber bands.
- Cable ties (or bread ties) on courier bags are not necessary; if you use them, don't over-tighten or they are hard to remove. Do use cable ties on courier tubs.
- With the new address label system, keeping a library's street address up to date is no longer as vital. If there's a change, you can wait to print new labels until your current supply runs out. *The current recommendation (a change from before) is to include a courier return label with paperwork when lending.* Libraries that send address cards with their return label on the back can't necessarily expect the same card to return to them.
- Report delivery delays or problems asap to Carolyn, allowing 2 hours after a missed delivery.

#### IV. KILR Business Meeting

1. Minutes from the Spring 2010 meeting were approved (Melissa Lienemann moved, Rita Severt seconded).
2. *Connie Hocking, Chair*, reported that the balance for the KILR account is \$689.95, less expenses for this meeting (copies, coffee break supplies). Vice Chair Paula Elder was unable to attend because of a family illness.
3. 69 names are on our membership roster; of those, 21 expired in 2009 and 18 expired this year prior to Oct. 1, leaving a total of 30 current members. KILR has traditionally been one of the largest KLA roundtables. What can we do to increase our membership? Currently dues are \$5 (\$3 for KILR and \$2 for KLA) and are on a rolling expiration date. Would setting a common expiration period help? Many join or renew when signing up for the KLA conference in spring, but others may prefer to pay all dues in a lump sum when renewing their membership at another time of year. Packets for this meeting include a membership application form. Please consider joining (or re-joining) KLA and KILR if you haven't already!
4. KLA Update. The KLA Council is made up of representatives from standing committees, sections and roundtables, as well as affiliated councils. The fiscal year for both KLA and KILR runs July 1 through June 30. The fiscal year ending 6/30/2010 found KLA running a deficit of over \$9,000. They asked to borrow from the sections and roundtables to cover it (since all funds are in one account, they could actually use them without asking). Some sections donated and some funds were borrowed in proportion to their account balances. All borrowed funds have now been repaid. Through a lot of hard work by our executive council and paid staff, things are turning around and the organization is moving forward. As of 9/30/2010 we are back in the black financially. KLA no longer has a paid executive director; the paid staff are part-time. President of KLA for 2010-2011 is Emily Sitz (SWKLS); Vice President is Royce Kitts (Tonganoxie Public); Mickey Coalwell (NEKLS) is Second Vice President; Secretary is Cindi Hickey (State Library); Treasurer is Cynthia Berner Harris (Wichita Public).
5. KLA Spring Conference. The 2011 KLA conference will be held April 6-8 at the Topeka Capital Plaza Hotel in Topeka. The theme is "Share the Vision," and Royce Kitts is coordinator for the event. In the past the KILR business meeting was on Friday morning while other ILL-related sessions were on Thursday, so only a hardy handful of members were present for the business session. Connie hopes to change that this year and find a time on Thursday for our meeting, perhaps in conjunction with the customary KLC Update. Suggestions are welcomed for conference session topics as well as ideas for a KILR-themed silent auction basket. The KLA conference for 2012 will be in Wichita; KLA Council is considering a tri-conference for 2013, which would likely take place in fall rather than spring.
6. Colorado ILL Conference. Connie recommended the 2011 Colorado ILL conference, which will be April 28-29 at CO State Univ in Fort Collins; people from many states regularly attend this nationally-known conference. Scholarships or grants may be available through the Conference.
7. ILL Workshop. There has been some interest in holding another statewide ILL workshop as a forum for discussing best practices for day-to-day procedures. If you have ideas, dreams, or plans for this, you can make it happen! Contact a KILR officer to get things rolling.
8. Communications. All KS ILL practitioners are encouraged to subscribe to KANILL-L and KANLIB-L. See <http://skyways.lib.ks.us/lists/> to join or for more information. Would it make sense for KILR to have a facebook presence? A Google Group? What's the best way to get word out to all who need to hear it?

Recorded by Greta Hiebert, KILR Secretary